

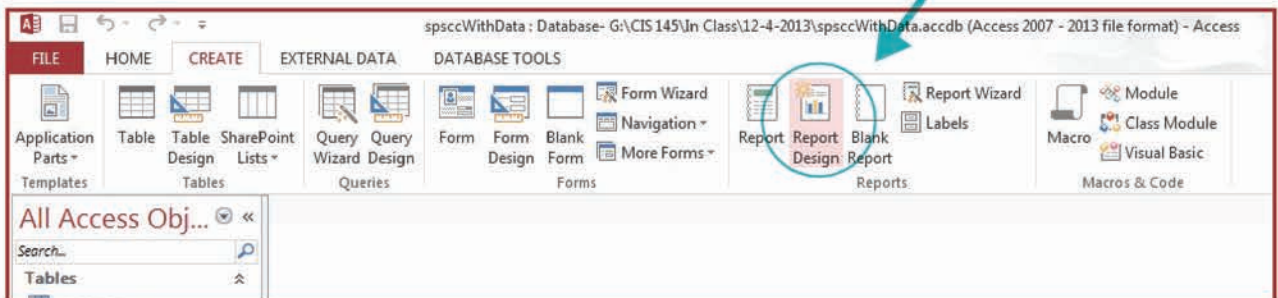
Create A Report With Grouping

In Microsoft Access 2013

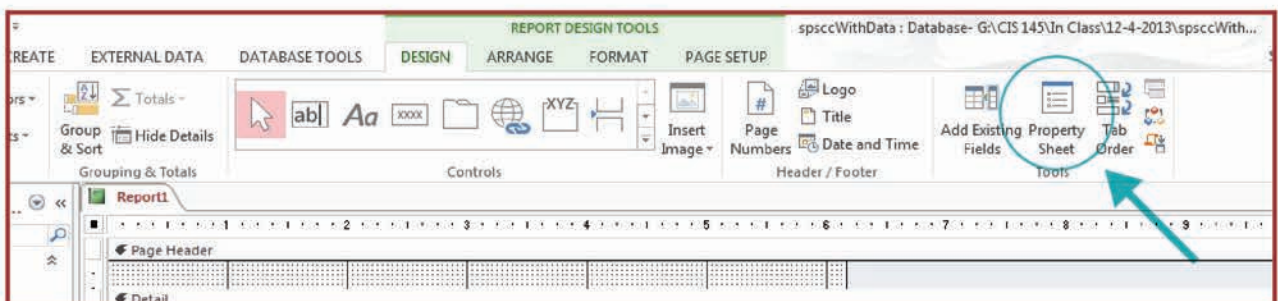
Tutorial By : Jeremy Soule / South Puget Sound Community College / Summer 2014

Making a report in Access 2013 is a fairly straightforward process, but sometimes when you need to organize a table's entries into groups it can become confusing as to what is going on. The point of this tutorial is to step you through creating a report from scratch that contains grouping, hopefully in a way that helps make sense of what grouping is about. It is meant for students who already have some experience in Access.

- 1 Open the "courses" table and take a look at the information displayed in it. This is going to be the table from which you will create your report. Understand that each row (entry) is about a particular course, having a unique combination of department and course number to identify it as its primary key.
- 2 On the ribbon, go to **Create > Reports > Report Design**. This will start you off with a completely blank report set up.

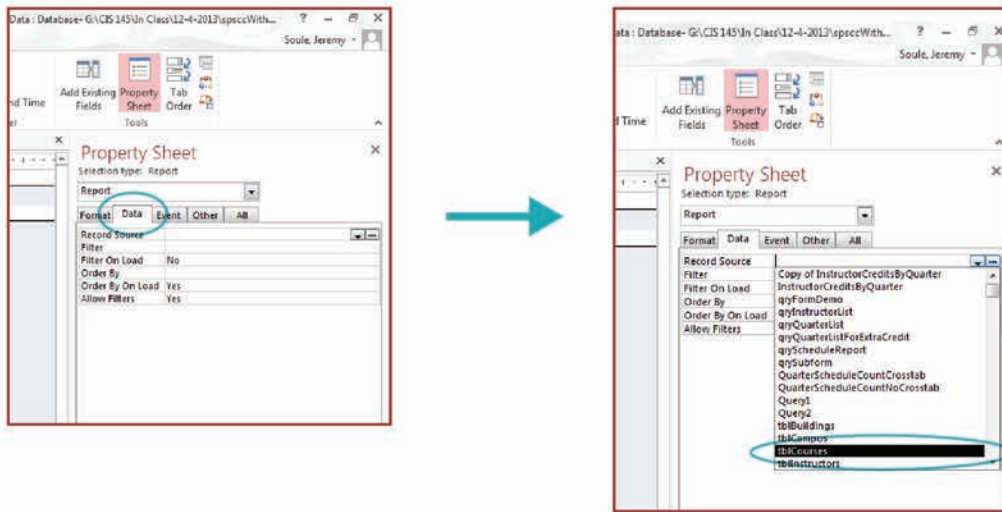


- 3a Set the record source. In the **Design** tab (in the **Report Design Tools** group, highlighted green on your screen), click on **Property Sheet**.



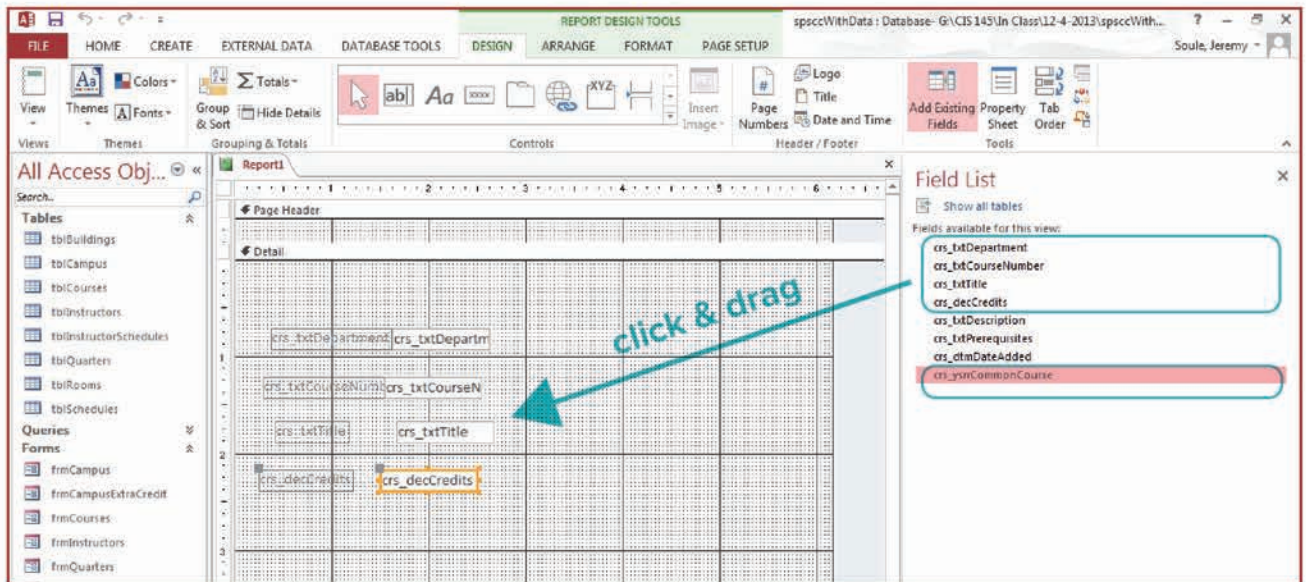
3b

Locate the **Data** tab on the property sheet, and click the small blue box on the **Record Source** line (the first option). This will bring you to a drop down menu; select “tblCourses”.



4

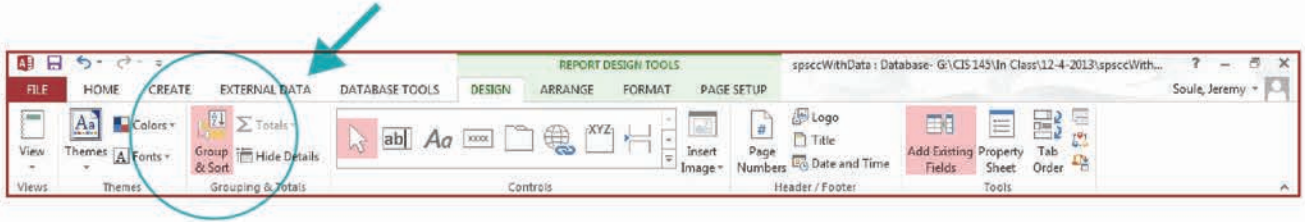
In the design tab, click **Add Existing Fields**. You should now see the fields from the tblCourses table. We are only going to use the first 4 fields, as well as the last (crs_ysnCommonCourse). Click and drag them one by one into the detail section of the report.



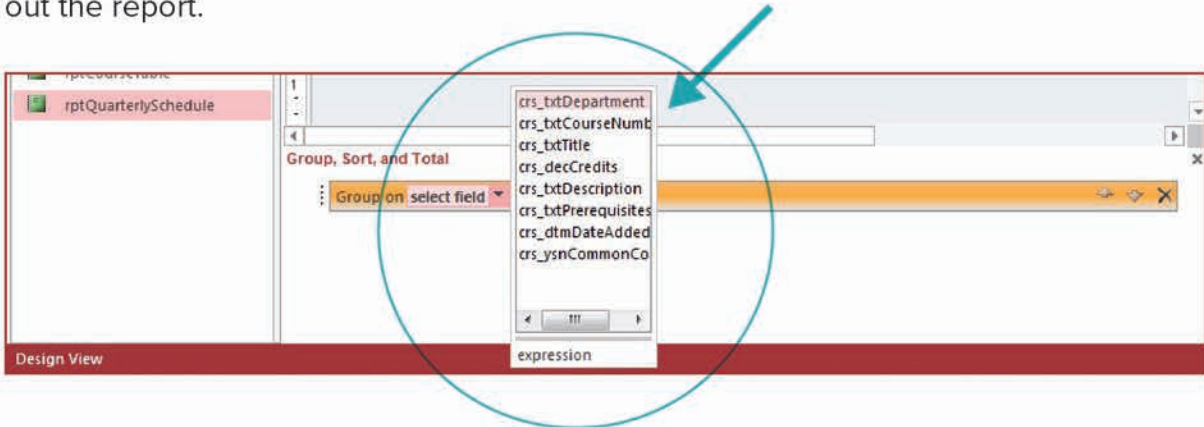
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The point of a report is to have a way to summarize information about data in a particular table or query. Grouping is particularly useful when you want organize your report into sections. For this page header, we are going to be summarizing data about classes. It will be helpful to split the report into sections based on each class’s department. That way, all “CIS” classes will be together in one place, as well as all “CNA” classes, etc.

- 6a** We want to turn on grouping now, before we try and organize the layout (since the grouping will affect the layout). In “Report Design Tools”, go to the **Design Tab** and click on “Group and Sort”. This will bring up your grouping and sorting options at the bottom of the screen.

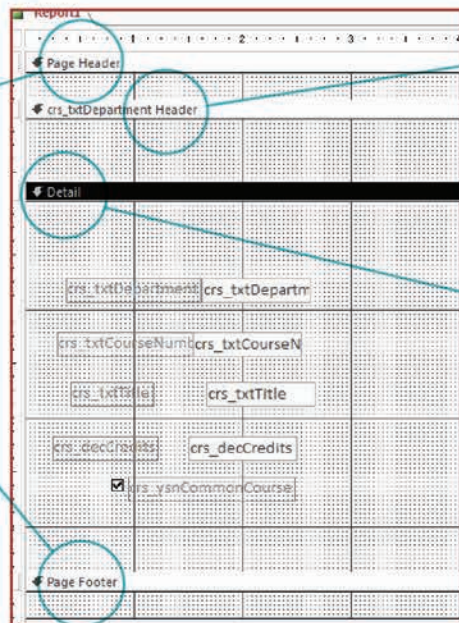


- 6b** Click on “add a group”, and select “crs_txtDepartment”. Notice that a new section pops up in your report layout: crs_txtDepartment Header. Now we have what we need to start laying out the report.



- 7** When thinking about the report and the way it will appear, it is helpful to remember a couple of things:

a. The **Page Header & Footer** will repeat once for every page there is in the report. The page header is where we will want to add most of our labels for the fields (which get created automatically when you drag fields over).

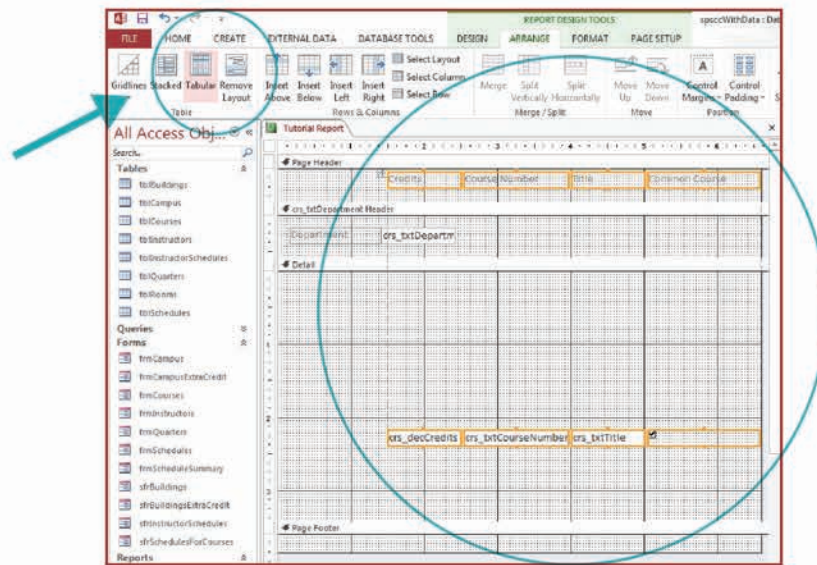


b. The **Department Header** will repeat for every different department. There will be one “CIS” section, one “CNA” section, and so forth.

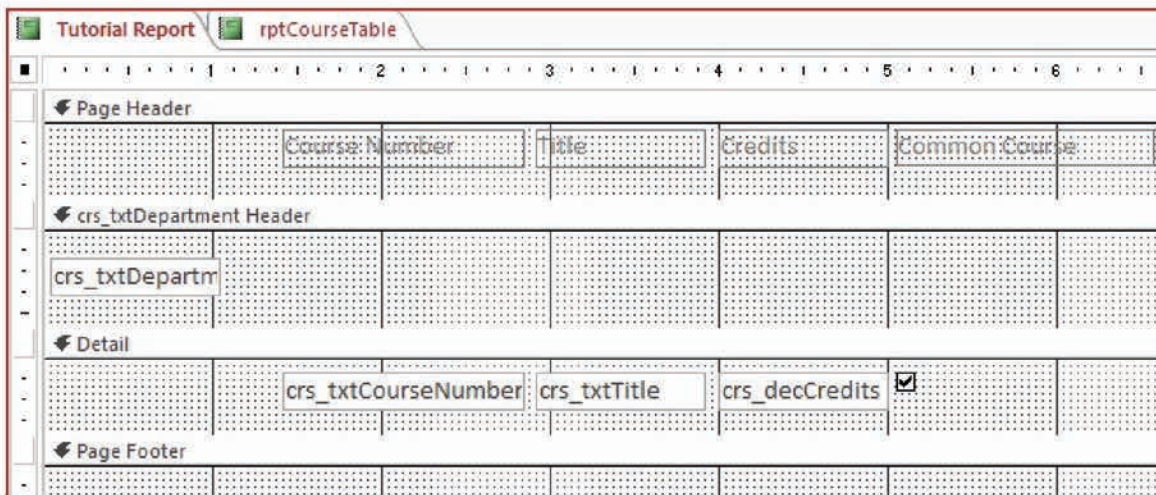
c. The **Detail** section is the area which will repeat for every entry (row) in the courses table. It will contain most of the fields that we dragged over earlier.

8a Go ahead and edit the labels in the detail section by taking off the prefixes (such as “crs_txt”) and adding some spaces between words. Make sure you are editing *labels*, not field text boxes (editing field names will mess things up fast). Once you are finished, move the “department” field into the “department header” and delete the department label altogether.

8b Now for a neat layout trick, courtesy of Randy Riness. Click and drag over all the fields and labels in the detail section so that they are all selected. In the “Report Design Tools” section, go **Arrange > Table** and click “Tabular”. This will automatically move all of the labels into the page header, just like we want! Now, simply click “remove layout” (right next to the “tabular” option), and you will be able to freely position the fields and their labels separately.



8c To move a label and a field together, click on a field so that it is highlighted and then hold down *shift* and click its corresponding label. Try and make the layout look like the screenshot below.

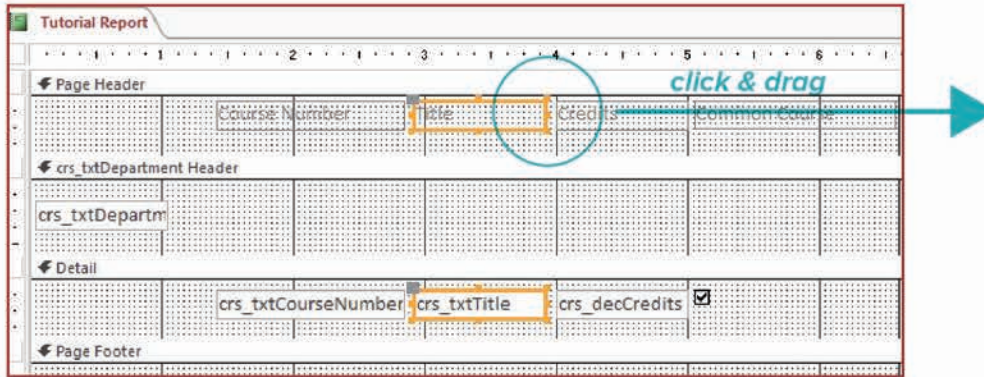


9a

Go **Design > Views**, and click on **Report View**. Notice the layout of the repeating sections and how it is broken up. If any titles are cut off or too long, adjust the field length to be longer or shorter by clicking back to design view.

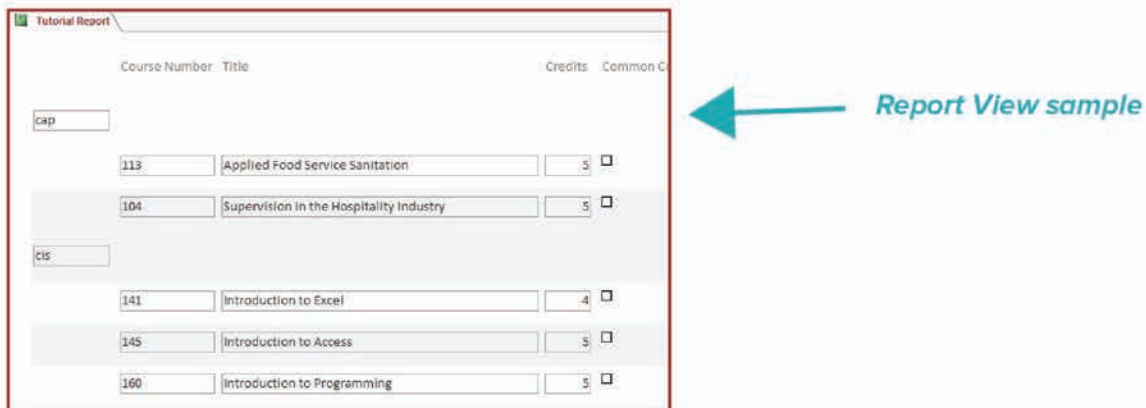
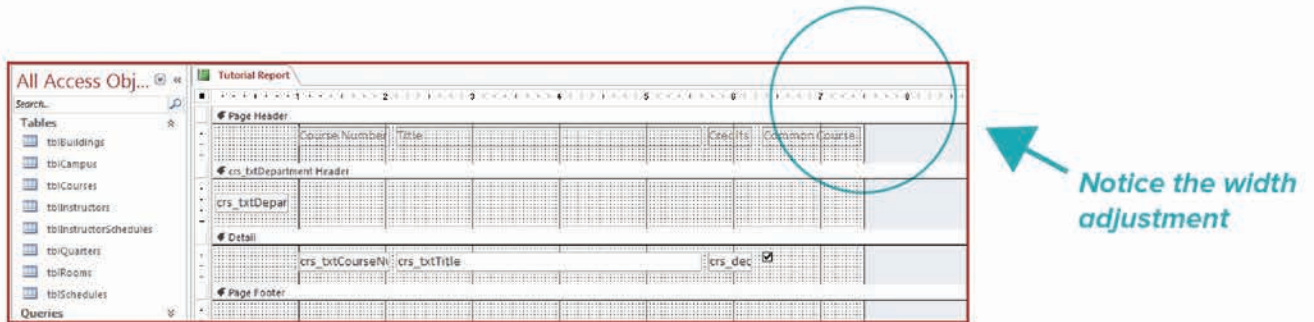
9b

To adjust field box widths (and also label widths), click on the individual field and *shift + click* on its corresponding label. Move your mouse to the right hand edge of the field box until a two way arrow appears. Click and drag to adjust the width.



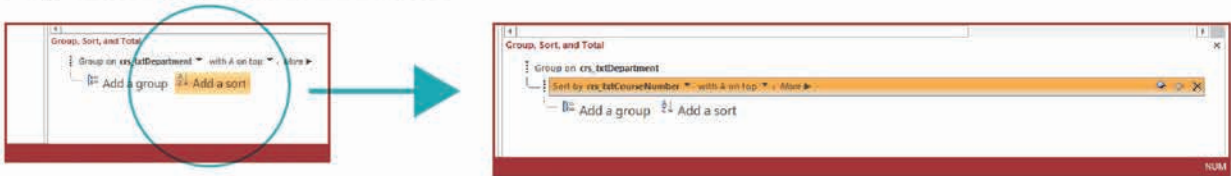
9c

Drag the width of the entire report (in design view) by hovering your mouse over the right edge of the report until you see a two-way arrow, then click and drag for more room. *Reports are meant to be printed*, so you won't want much more than 7.5 inches wide (a typical piece of paper is 8.5 inches wide, so 7.5 inches plus a .5 margin on either side of the printable area will be about your max). To preview how you report will look...



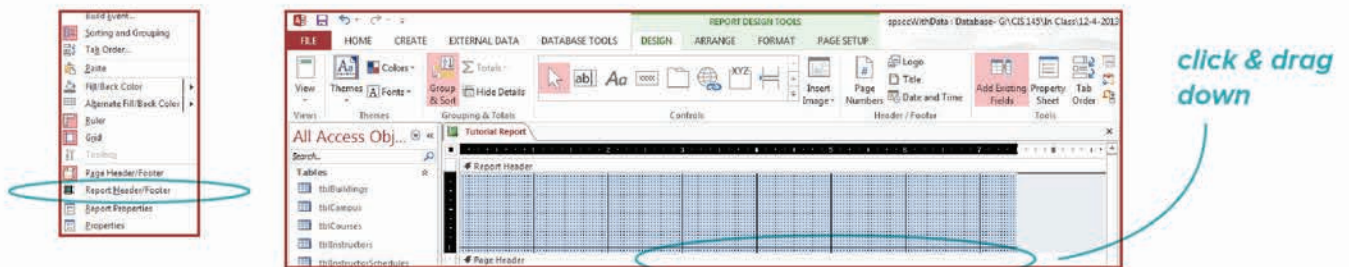
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A few finishing things for our report. One is sorting our individual sections. Right now there are some rows that seem out of order within each department section. To sort those numerically, in design view, at the bottom of the screen (grouping and sorting should still be there) click “add a sort”, and choose “course number”. This will order your courses within their respective department sections.



11a

Next, to finish our report, we want to add a report header. To do this, right click anywhere in the report that is not a label or text box. In your menu list that pops up, towards the bottom, click “Report header/Footer”. At the top and bottom, the report header and footer will pop up. To give a little more room for our title, bring your mouse to the top of the page header bar until a two-way arrow appears and drag down.



11b

Go to **Design > Controls** and choose a new label from the controls (the third option from the left). Click in the **Report Header** and type “SPSCC Courses”. Change the font size and color by going to **Format > Font** (under the **Report Design Tools** group). You can re-adjust the sizing of the label by dragging the lower right-hand corner of the label over until you see all of the text, and align the label itself over to the left side of the report by clicking and dragging it. Don’t forget to save your report!

